



Suggested Schedule for Required Reports (Large Libraries)

Daily Reports	Weekly Reports
<ul style="list-style-type: none">• Daily Notification Summary• Request to Fill (Request Manager)• Telephony Failures• Unclaimed Holds by Assigned Branch• Unclaimed Holds by Pickup Branch	<ul style="list-style-type: none">• Overdues Z Fold Mailer• Billing Z Fold Mailer• Lost Holds (Item-Specific Requests) by Library• Lost Holds (Bib-level – 1 item) by Assigned Branch
Monthly Reports	Yearly Reports
<ul style="list-style-type: none">• Claimed Items• In-Transit and Transferred Items• Lost Items• Missing Items	<ul style="list-style-type: none">• Annual Report



Suggested Schedule for Required Reports (Small Libraries)

January	February	March	April
<ul style="list-style-type: none"> • Claimed Items • <i>In-Transit and Transferred Items</i> • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch • Lost Items 	<ul style="list-style-type: none"> • Claimed Items • Lost Items • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch 	<ul style="list-style-type: none"> • Claimed Items • <i>In-Transit and Transferred Items</i> • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch • Lost Items 	<ul style="list-style-type: none"> • Claimed Items • Lost Items • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch
May	June	July	August
<ul style="list-style-type: none"> • Claimed Items • <i>In-Transit and Transferred Items</i> • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch • Lost Items • Missing Items 	<ul style="list-style-type: none"> • Claimed Items • Lost Items • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch • 	<ul style="list-style-type: none"> • Claimed Items • <i>In-Transit and Transferred Items</i> • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch • Lost Items 	<ul style="list-style-type: none"> • Claimed Items • Lost Items • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch
September	October	November	December
<ul style="list-style-type: none"> • Claimed Items • <i>In-Transit and Transferred Items</i> • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch • Lost Items 	<ul style="list-style-type: none"> • Claimed Items • Lost Items • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch 	<ul style="list-style-type: none"> • Claimed Items • <i>In-Transit and Transferred Items</i> • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch • Lost Items • Missing Items 	<ul style="list-style-type: none"> • Claimed Items • Lost Items • Lost Holds (Item-Specific Requests) by Library • Lost Holds (Bib-level –1 item) by Assigned Branch
Daily Reports: <ul style="list-style-type: none"> • Request to Fill (Request Manager) 		Weekly Reports: <ul style="list-style-type: none"> • Daily Notification Summary • Telephony Failures • Overdues Z Fold Mailer • Billing Z Fold Mailer 	